



HEALTH, SAFETY &
ENVIRONMENTAL MANUAL

6.3 Document and Records Control

Revision Number: **R0**

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SIGNATURE:

DOCUMENT AND RECORDS CONTROL PROCEDURE

PURPOSE

The purpose of J-AAR's document and record control policy and procedure is to identify the necessary and sufficient documentation to maximize the efficacy of our Occupational Health and Safety Management System. This policy will also cover the requirements for approval, review, maintenance, changing, and retention of the required documents and records.

Top management is committed to the continuous improvement of our OHSMS and shall demonstrate leadership and effective participation by taking ultimate responsibility for the organization's occupational health and safety performance and the OHSMS.

Top Management, or their designate, is responsible for monitoring forms and documentation currently in circulation, to identify and communicate ongoing legislative updates, that changes in current scope of work is reviewed on an ongoing basis and shall ensure that documents are reviewed by the appropriate workplace parties and approved prior to issue.

Top management is responsible to review, update, re-approve, or withdraw documents as necessary to ensure the integrity of our OHSMS is maintained and encourages continuous improvement of the system. They will ensure that changes to and current revision status of documents are tracked in the appropriate tracking sheets, these sheets shall show a revision number and what the change was.

SCOPE

This procedure applies to all documents and records created, circulated, used, and archived by employees of J-AAR for health and safety.

DEFINITIONS

Document:

Documents are pieces which contain, or have the potential to contain, information and can be edited. An example of a document is a blank equipment inspection.


Record:

Records are completed documents. They can no longer be changed. An example of this is a completed equipment inspection.

PROCEDURE

Identify the Necessary Documentation:

- Top management, with assistance from the health and safety team, will identify the necessary documents required for the J-AAR OHSMS.

 HEALTH, SAFETY & ENVIRONMENTAL MANUAL	6.3 Document and Records Control		
	Revision Number: R0		Number of Pages: 3
	Revision Date:	Approval Date: 10/01/2024	Effective Date: 10/01/2024

DOCUMENT AND RECORDS CONTROL PROCEDURE

- The health and safety team will review relevant legislation, in-house policies/procedures, external documents, and records such as MLITSD field visit report/order; WSIB/RTW forms; industry best practices, etc.

Document Approval:

- Top management will review and approve the necessary documents as required.
- Top management, or designates, shall assure that all documents, tracking sheets, and postings are legible, dated (with revision dates), readily identifiable, kept orderly, and retained for a pre-determined period or otherwise required by law.
- OHSM system documents shall be developed using document identification.
- Dates shall be recorded with:
 - Review date shall be the date the document has been revised
 - Approval date shall be when top management has reviewed and approved the document.
 - Effective date shall be when the newly approved document becomes effective.
 - Dates will be written on the header of each document and tracked in the Revision Log.


Document Review, Update, Re-Approve, or Withdrawal:

- As required, annually at a minimum, top management in conjunction with the health and safety team will review all documents and provide updates, re-approval, or withdrawal of use as the result of review.

Document Issued/Recirculated:

- After the document has been approved by top management, the health and safety team will issue and circulate the most recent version to J-AAR worksites and facilities. This will predominantly be done through HCSS. Hardcopies may be required in remote and infrequent circumstances.
- The dates and revision number will be found on all internally created documents. This will ensure that the most up to date documents will be issued.
- The health and safety team will notify all relevant workplace parties when there is a new/revised/withdrawn document and provide them with the appropriate new documentation.
- Obsolete or older documents will be removed from circulation by the health and safety team to ensure that only the most up-to-date documents are available.

Document and Record Storage:

 HEALTH, SAFETY & ENVIRONMENTAL MANUAL	6.3 Document and Records Control		
	Revision Number: R0		Number of Pages: 3
	Revision Date:	Approval Date: 10/01/2024	Effective Date: 10/01/2024

DOCUMENT AND RECORDS CONTROL PROCEDURE

- The security and confidentiality of all company documents and records must be considered. Documents with confidential or sensitive information will be filed in locations only accessible by top management or their delegates.
- Any employee found to breach the J-AAR privacy and confidentiality agreement will be subject to J-AAR's progressive discipline policy.
- Documents and records must be stored in a way that keeps them legible and readily identifiable.
- Documents and records will be stored electronically indefinitely on J-AAR's and HCSS' servers.
- Physical documents from projects will be stored at the J-AAR office for a minimum of one year after completion of the project, or longer if legislation requires.

REQUIRED DOCUMENTS AND RECORDS

- All J-AAR's Health and Safety Policies, Programs, and Procedures
- Corporate Hazard Identification and Risk Assessment Matrix
- Job Hazard Analysis form
- Site Specific Safety plan
- Subcontractors Qualification and Evaluation records
- Company rules
- Progressive discipline records
- Equipment and tool inventory
- Maintenance schedules and records
- JHSC meeting and minutes
- Manufacturer's manuals
- Training requirements matrix
- Incident investigation reports
- Emergency response plans/procedure
- Emergency drill records
- Site statistics
- Traffic control plans
- Confined space entry permits
- External communication (MLTSD, Form 8, FAF, etc.)
- Company annual reports
- Safe Work Procedures
- Safe Work Practices